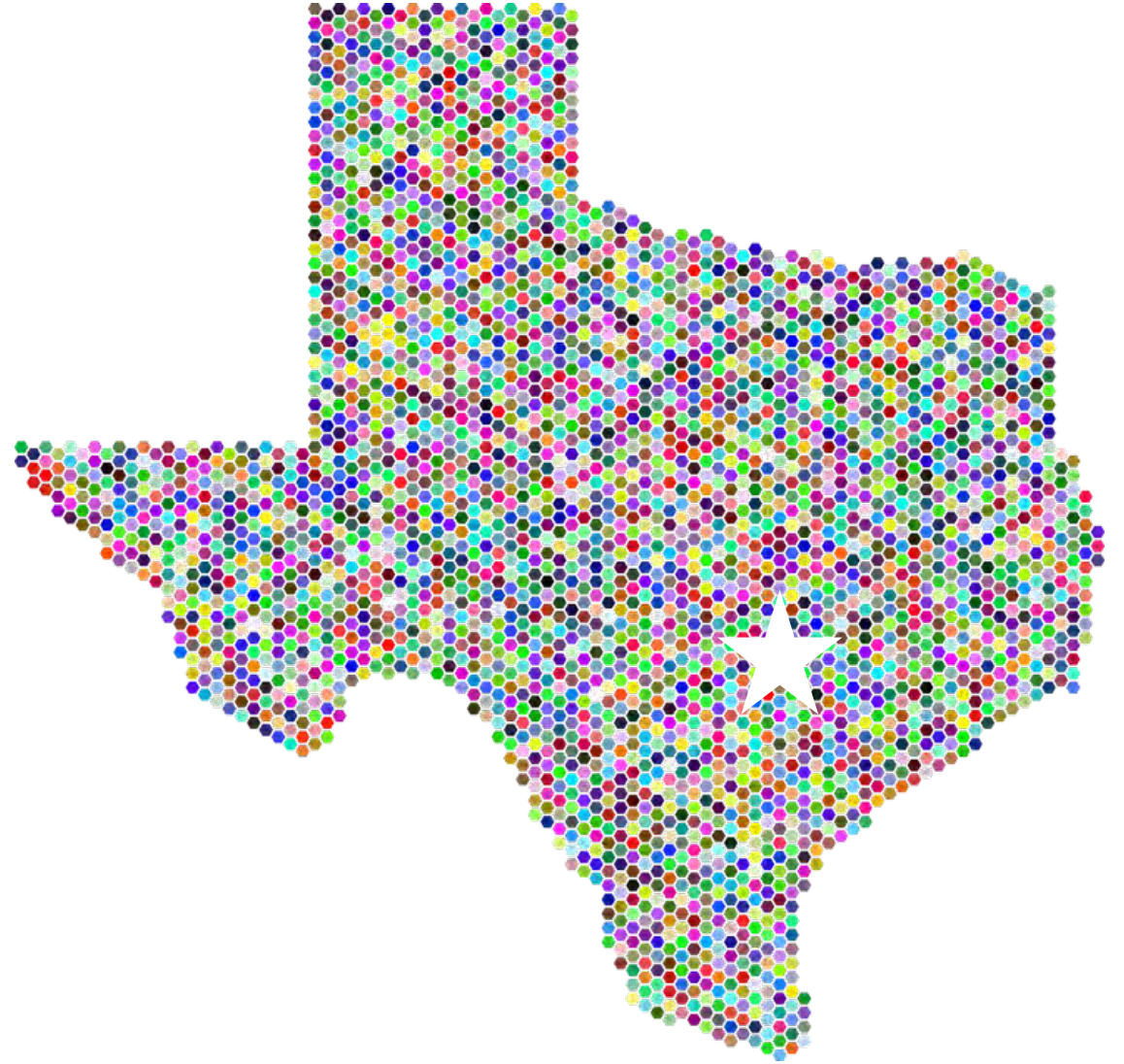


Take Charge Texas (TCT) Demonstration

April 20th, 2023



Meet the Facilitators

DSHS/HHSC TEAM



Charletha Joseph
Program Support



Mahesh Rajapaske
Program Support



Rachel Sanor
THMP Manager



Christine Salinas
ADAP Manager



Holly Benavides
TCT Help Desk Manager



Ramani Siddharthan
TCT Help Desk



Hillary Alamene
Program Specialist

DELOITTE TEAM



Nikki Fernandes
Project Manager



Meeta Sharma
Test Lead



Hunter Chernyha
Team Lead/Scrum Master



Krishna Dixit
Consultant/Discovery

Agenda

- 1  Introduction & Overview of Objectives
- 2  TCT Roadmap
- 3  System Overview: New TCT Features
- 4  Gathering Your Feedback
- 5  Close Out & Next Steps

How to Ask Questions:

All lines are muted.

We will save time for your feedback & questions throughout the presentation. Please come off mute and ask questions at that time!

Poll Everywhere

Poll Everywhere

Please navigate to the following Poll Everywhere Link to respond to the following question:

If you are a **DSHS Staff member**, please use this link:

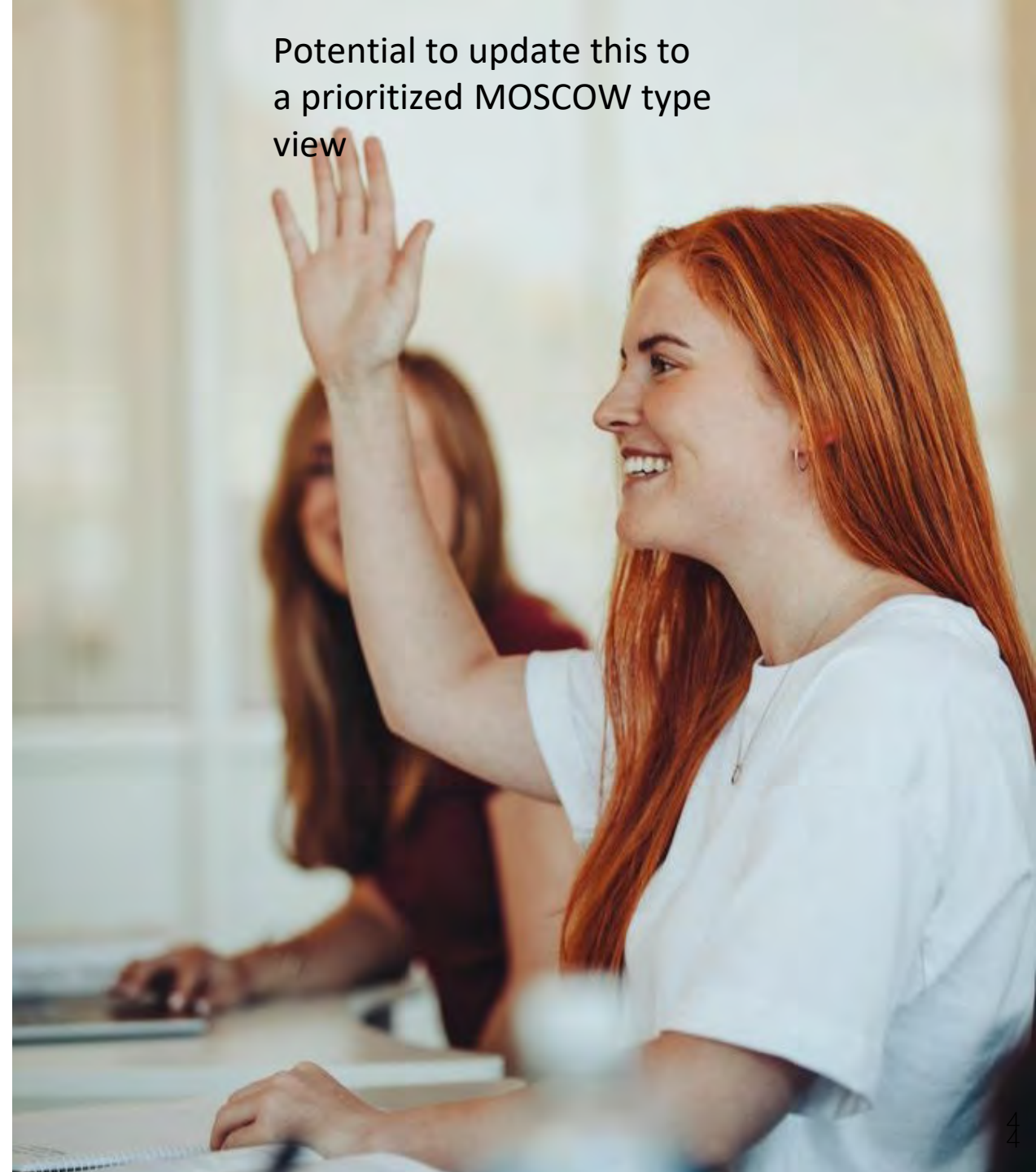
PolleEV.com/tctdshsstaff

If you are **not** a DSHS Staff member (agency workers, etc.), please use this link:

PolleEV.com/tctnondshsstaff

What do you hope to learn through this session?

Potential to update this to a prioritized MOSCOW type view



Today's Objectives

The objective of today's session is to provide an overview of new features implemented in the TCT system and gather your feedback to ensure the features we plan to implement in the future result in improved client service delivery and health outcomes for people with HIV in Texas.

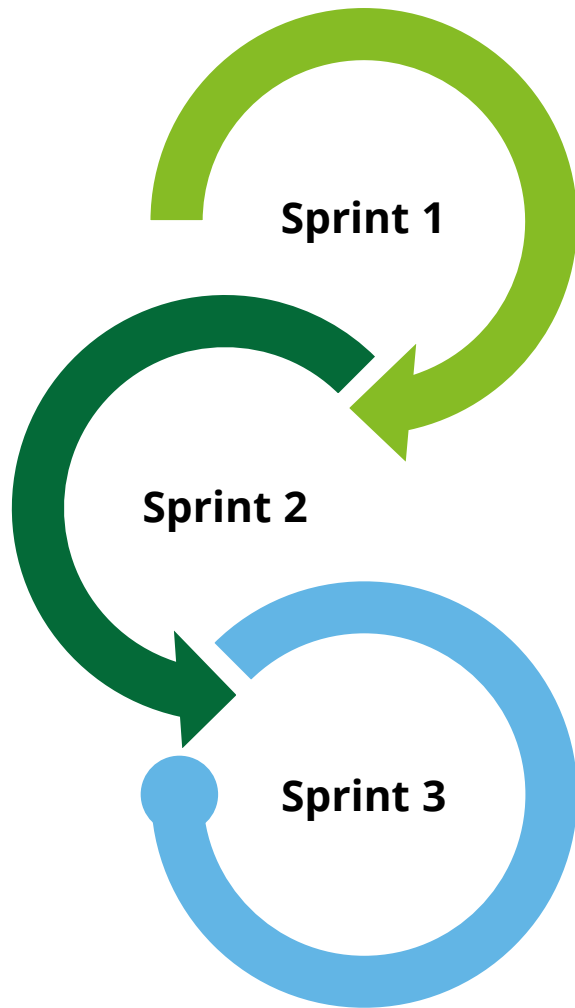


TCT Roadmap



Project Plan: Successfully Completed Features

The graphic below represents the features & user stories our team has developed since initiation of Enhancements in January 2023.



Focused on RSR submission in TCT System, supporting multiple agencies as they submitted the annual report, in addition to establishing new client creation process

- Client Import into TCT & New Client Creation
- TCT Client Import – Successful Creation
- TCT Client Import – Failed Creation
- Adding EUCI Code as a Search Parameter
- Updating 'Sex at Birth' to an Editable Field

Focused on client merge process, establishing the framework to initiate automated process, in addition to features for task board which provided a seamless workflow for TCT users

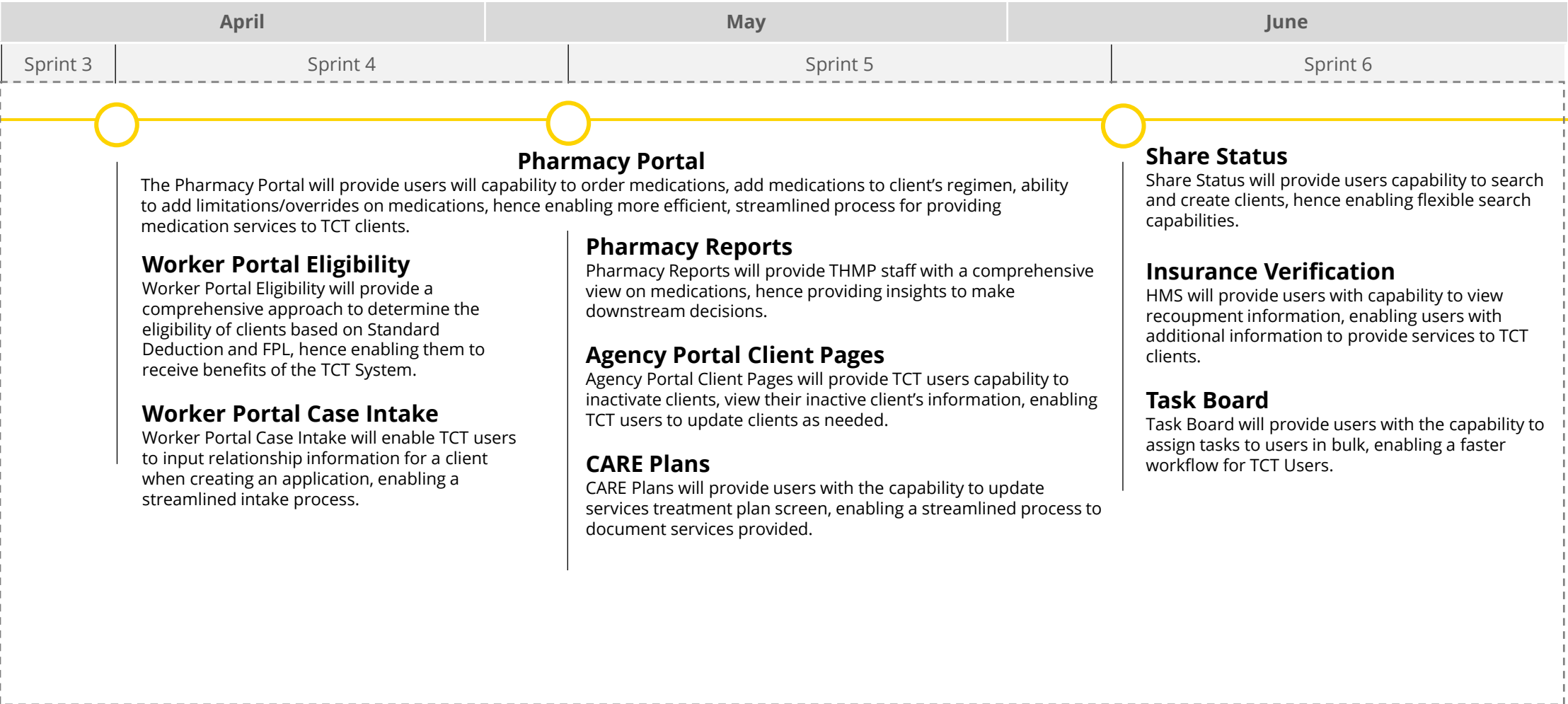
- Identification of Potential Duplicates
- Client Merge Automation Rules
- UI Screen: Duplicate Client Report
- Inactivating 'Apply Now' for Linked Clients
- Updating Filters to Multi-Select Values
- Addition of THMP Subprograms
- Addition of Date Submitted Filters

Focused on establishing an automated client merge process which reduced the lengthy manual client merge process, updating Share Status capabilities, and further enhancing task board features

- Client Merge Report
- Exception Messages for Failed Merges
- Client Merge Automation Rules
- Split CARE & THMP Services in 'My Needs'
- Adding New Case Note Categories
- Allowing for Private Case Notes
- Updating Share Status in Agency Portal
- Updating Task Board Permissions
- Edit THMP Subprograms

Project Plan: Short-Term

The graphic below represents the features that we will develop over the next few months and the anticipated impact it will have on TCT users and clients. *



Poll Everywhere

Poll Everywhere

Please navigate to the following Poll Everywhere Link to respond to the following question:

If you are a **DSHS Staff member**, please use this link:

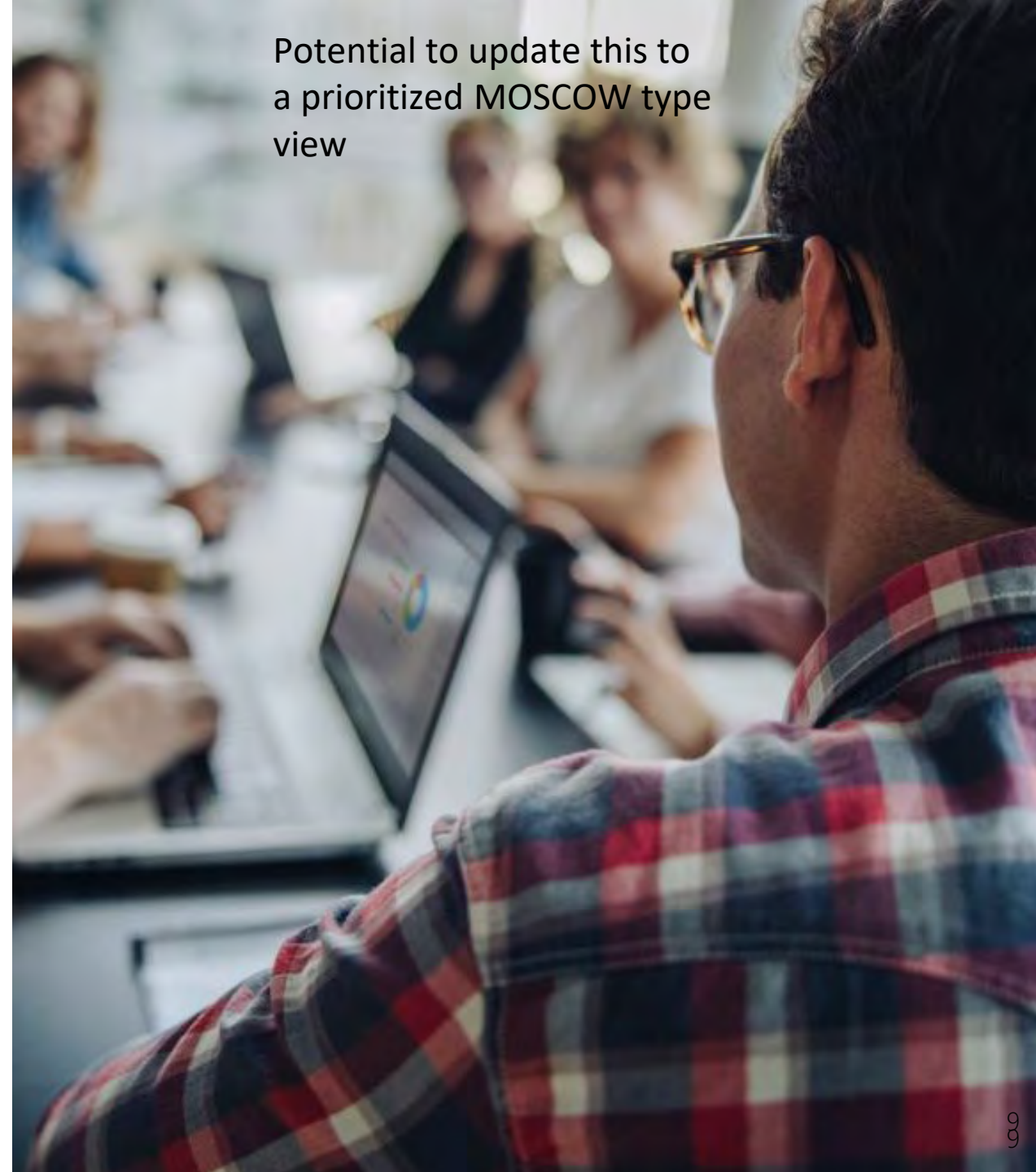
PolLEV.com/tctdshsstaff

If you are **not** a DSHS Staff member (agency workers, etc.), please use this link:

PolLEV.com/tctnondshsstaff

**How beneficial are the upcoming TCT System enhancements?
Please click on the rank to submit your answer.**

Potential to update this to a prioritized MOSCOW type view



System Overview: **New** TCT Features



Live Demonstration of TCT Features

TCT Features Video Presentation

[Case Notes](#)

[Share Status](#)

[Task Board](#)

[HIV/THMP Split](#)

[Automated Client Merge](#)



Gathering Your Feedback



Poll Everywhere

Poll Everywhere

Please navigate to the following Poll Everywhere Link to respond to the following question:

If you are a **DSHS Staff member**, please use this link:

PolleEV.com/tctdshsstaff

If you are **not** a DSHS Staff member (agency workers, etc.), please use this link:

PolleEV.com/tctnondshsstaff

What additional items would you like to see for these sessions?



Next Steps



Upcoming Activities

Please reach out Charletha & Mahesh for any questions related to this presentation.



Charletha Joseph

Charletha.Joseph@dshs.texas.gov



Mahesh Rajapakse

Mahesh.Rajapakse@dshs.texas.gov



Our team will **share this presentation** with this group following this session.



Our team will host the **next TCT User Engagement session** on Thursday, May 18th.



Our team will be sharing a **brief survey** to gather additional feedback, suggestions, or recommendations for the TakeChargeTexas application.

(Further communication to come on this topic!)

Thank You!

System Overview: **New** TCT Features



Feature Updates: Sprint 3

Update THMP Subprogram

Edit Task

Client Name: Alberto Reyna Application ID: 2000071 Application Type: Recertification

CARE Agency: 4826 - AIDS Healthcare Foundation - Tar CARE Owner: Select CARE Status: Submitted

THMP Subprogram: Select (dropdown menu open showing: Select, TIAP, SPAP, ADAP) THMP Region: Select THMP Owner: Select

HOPWA Status: Not applicable HOPWA Sponsor:

Save Changes **Cancel**

Taskboard details updated successfully!

Task Board

CARE Status: Select an Option THMP Status: Select an Option HOPWA Status: Select an Option Application Type: Select an Option

THMP Region: THMP Subprogram: Client ID: Birth Month:

TCT users will be able to update a task's THMP Subprogram in the task board therefore ensuring alignment of tasks under THMP program.

Update Task Board

Edit Task

Client Name: Lily James Application ID: 2124151 Application Type: Application

CARE Agency: 4805 - Special Health Resources for Texa CARE Owner: Select CARE Status: Submitted

THMP Subprogram: ADAP THMP Region: Houston/East Texas Area THMP Owner: Select

THMP Status: Submitted HOPWA Status: Not applicable HOPWA Sponsor:

Save Changes **Cancel**

TCT users will be able to view tasks on the Task Board that they have submitted applications for, even if that task is of a different program, therefore ensuring that visibility into those tasks is not lost.

Feature Updates: Sprint 3

Update Share Status

Note:
By selecting 'Yes' to share your status, Take Charge Texas allows your HIV service providers to share your Personal Health Information with each other, saving you both time and paperwork. For most clients, you will only need to provide your information once and will not have to complete multiple applications at each organization you access for services. This allows providers to coordinate services and referrals more easily for and with you.
By selecting 'No' to share your status, you will need to complete an application and verify your eligibility documents for each program and at each organization you access for services. This will increase the time it takes to process your application and the amount of paperwork you will be required to submit each time you visit a new provider.

Share Status *

 Select
 Yes
 No

Is Client Active?

Save

When changed from Yes to No, they will be required to select the Provider Agency

Note:
By selecting 'Yes' to share your status, Take Charge Texas allows your HIV service providers to share your Personal Health Information with each other, saving you both time and paperwork. For most clients, you will only need to provide your information once and will not have to complete multiple applications at each organization you access for services. This allows providers to coordinate services and referrals more easily for and with you.
By selecting 'No' to share your status, you will need to complete an application and verify your eligibility documents for each program and at each organization you access for services. This will increase the time it takes to process your application and the amount of paperwork you will be required to submit each time you visit a new provider.

Share Status *

Agency *

Is Client Active?

Save

When changed from No to Yes, there will be an informational text displayed, to be confirmed to proceed with No to Yes change

The Share Status change allows other Ryan White contractors to search for the client name and view the information in this client record.

Confirm Cancel

At the time of client creation, all users can enter in their initial response to Share Status. **For users to be able to update the Share Status, users will have to have the required access level.** Admins will need to add the user role which will have certain level of access to update Share Status. Once the change is deployed in production, then the below access will need to be set up.

Add Role to Screen Mapping

Menu Item *

Role *

Access Level *

Cancel Save

Add Role to Screen Mapping

Menu Item *

Role *

 AA Data Manager
 AA Fiscal Staff
 AA Program Staff
 ADAP Data_Maintenance
 ADAP JW PSI PHHS

Access Level *

Cancel Save

Add Role to Screen Mapping

Menu Item *

Role *

Access Level *

 None
 Read
 Read/Write

Save

Feature Updates: Sprint 3

Private Case Note

For the following case note categories, it will be automatically categorized as private with the following help text: Legal, Psychotherapy and Substance Use Treatment

The image displays three side-by-side screenshots of the 'Case Notes' form. Each screenshot shows the 'Add a Note' section with a dropdown menu for 'Select Note Category' and a 'Private' checkbox. In all three cases, the category is selected and the 'Private' checkbox is checked.

- Legal:** The dropdown menu shows 'Legal'. The 'Private' checkbox is checked.
- Psychotherapy:** The dropdown menu shows 'Psychotherapy'. The 'Private' checkbox is checked.
- Substance Use Treatment:** The dropdown menu shows 'Substance Use Treatment'. The 'Private' checkbox is checked.

Below the dropdown menu, there is a 'Help Text' section that reads: 'Please note that the case note you are entering is categorized as a private case note and will only be visible to you. If you'd like this to be visible to others, please select a different note category.' Below the help text is a text area labeled 'Note *'.

For the following case note categories, an option to categorized as private will be available: Medical Case Management, Non-Medical Case Management, and Other

The image displays a screenshot of the 'Case Notes' form. The 'Add a Note' section shows a dropdown menu for 'Select Note Category' with 'Medical Case Management' selected. The 'Private' checkbox is unchecked.

Below the dropdown menu, there is a 'Help Text' section that reads: 'Please note that the case note you are entering is categorized as a private case note and will only be visible to you. If you'd like this to be visible to others, please select a different note category.' Below the help text is a text area labeled 'Note *'.

TCT users will be able to choose whether the case note written by the user can be shared with other users or not, therefore ensuring privacy considerations are intact for specific case note categories, if needed.

Feature Updates: Sprint 3

Private Case Note (Continued)

Once marked as private, the following help text will appear:

Case Notes

Add a Note

Select Note Category *

Medical Case Management

☒ Private

Help Text :

Please note that the case note you are entering is categorized as a private case note and will only be visible to you. If you'd like this to be visible to others, please remove your selection to make it private.

Note *

For private case notes, user will be able to view the case note header information, not the actual case note

All Notes

Note Category

User

Provider Agency

Select

Select an Option

Select

Filter

10

Showing rows 1 to 1 of 1

1

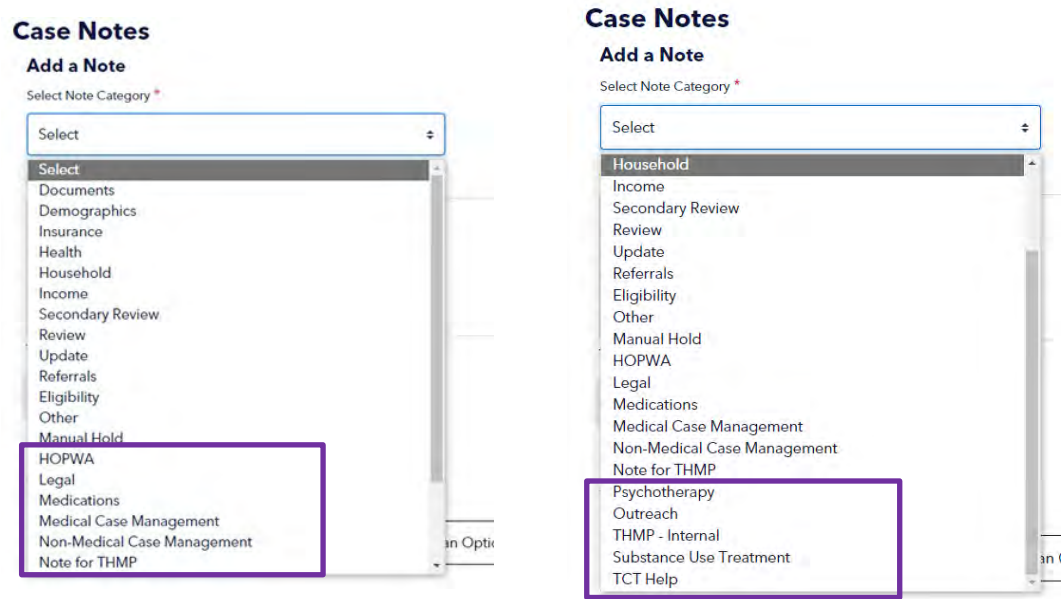
Notes

admin, admin - 4800 - Texas Department of State Health Services - 4/13/2023, 4:51 PM - Private : Legal

TCT users will be able to choose whether the case note written by the user can be shared with other users or not, therefore ensuring privacy considerations are intact for specific case note categories, if needed.

Feature Updates: Sprint 3

Additional Case Note Categories



TCT users will be able to choose new additional case note categories, therefore, providing more flexible case note capacities and discreet categories for users.

Access to edits for the **THMP-Internal case note**, will be available to view to the following user roles:

Role
ADAP Data ManAdmin
ADAP EW (PSI PHPSII)
ADAP EW PSIII
ADAP Order Processor

If users are not logged in as one of the above mentioned roles, they will not be able to view the note.

THMP-Internal: TCT System will allow THMP users with the ability to share discreet notes amongst select THMP users only, therefore, enhancing and keeping intact client privacy policies.

Automated Client Merge Process



Duplicate Client in System

Client is registered in TCT System twice (regardless of the source of client creation – agency portal or client portal)



Clients with Exact Matches will be Auto-Merged

Clients who have matched 100% will be automatically merged by the system.



Client Merge Report

System will update the Client Merge Report with clients that were successfully merged and clients that failed the automated merge. Error messages will be available for these records so that users may review & resolve.

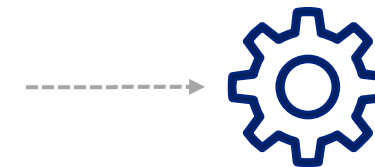
TCT Identifies Duplicates

Duplicate entries of clients will be automatically flagged in the TCT System based on **Client Name, DOB, and SSN/ITIN.**



Potential Duplicate Clients are available for Review

Clients who have not matched 100% will be part of the Potential Duplicate Report. DSHS staff / Data Manager will review the report. They will determine if the client is a duplicate by populating the 'Merge Client' column in the UI screen with a Yes / No (*performed within TCT System – UI Screen*)



Potential Duplicates Approved for Merge will be Merged by System

Clients who were approved for merge on the UI screen will be merged using the pre-defined merge rules.

Feature Updates: Client Merge

System Identification of Potential Duplicate Clients

1

Identification of duplicates by the System will be based on the following primary and secondary data elements.

Primary Data Elements

Client Name
Date of Birth
SSN or ITIN

2

If both SSN and ITIN are not present, system will use the secondary data elements to identify potential duplicates instead. Only one of the secondary data elements listed below needs to be identified as a match between clients to consider for a possible merge.

Secondary Data Elements

Primary Phone
Secondary Phone
Email
Mailing Address
Drivers License
Physical Address

TCT System will automatically identify potential duplicate clients that exist within the system, therefore, enabling a report to be curated for users to review and take further action to merge if appropriate.

If there is a **100% match based on the primary data elements**, TCT System will process the automatic merge process, without any user intervention.

If **only two of the three primary data elements are a match**, those client records will be part of the **Duplicate Client Identification report**, for users to review and provide merge decisions, as applicable.

Feature Updates: Client Merge

Duplicate Client Identification Report

Duplicate Client Identification

Search Criteria

Client Name

Client Id

County

Select

Q Search

Q Clear

Client ID 1	Client ID 2	Client Name 1	Client Name 2	Client DOB 1	Client DOB 2	Client SSN 1	Client SSN 2	Client ITIN 1	Client ITIN 2	TexasDLID 1	TexasDLID 2	Matching Field	Matching Value	Client1 County	Client2 County	Select
208729	205489	Charles Robertson	Charles Robertson	09/17/1951	09/17/1951	111219828	111216588					PrimaryPhoneNumber	9876543210	Travis	Dallas	Yes No
264569	198972	Danell Mcane	Danell Mcane	01/07/1991	01/07/1991	111275329	111210074					PrimaryPhoneNumber	9876543210	Travis	Harris	Yes No
245113	147452	David Taylor	David Taylor	11/01/1970	11/01/1970	111255964	111158562					PrimaryPhoneNumber	9876543210	Dallas	Dallas	Yes No

TCT users will be able to access a report of potential duplicate clients that exist within the system, therefore, having the capability to review the records and determine if the client records can be merged.

Client Merge Automation Rules

No	Merge Screen Name	Rules
1	Demographics	If one of the clients to be merged is CARE only and other has THMP services, then demographics data from the client that has THMP services takes precedence. If both the client IDs being merged have THMP services then pick the data from the latest record. Latest record is defined as the Last Updated date in TCT system. MCI ClientMaster, DataCollection.Contact tables If none of the client IDs being merged have THMP services then the latest records takes precedence. Latest record is defined as the Last Updated date in TCT system
2	Physical Address	Latest records takes precedence. Latest record is defined as the Last Updated date in TCT system
3	Other contact info	Select the information for the client where there is other contact provided. Ignore the record with Null information If both of the client IDs being merged have information then select the latest record.
4	Contact Preference	Select the latest record
5	Emergency Contact	Select the latest record
7	Marital Status (Whole section)	Latest Date stamp latest updated into the system
8	Household Details	Latest information entered into the system
	Household Member	Select the data for Household members based on the selection made on the household Details section. Select the household member records corresponding to the household details selection.
9	Financial Information	Select the latest information entered into the system
	Client Income Sources	Select the information corresponding to the selection made for financial information section.
	Spousal Income	Select the information corresponding to the selection made for financial information section.
10	Asset and expenses	Select the latest information updated into the system
11	Basic Medical Info	Select data from a client having CARE program. CARE data takes precedence for medical information section. If there are CARE and THMP programs on two clients to be merged then, CARE data to taken precedence, if both the clients have CARE program then select the latest record. Always select 'HIV Positive'. If one of the record has HIV positive then select 'HIV Positive'
12	CDC Disease Stage	If Medicare, Medicaid or Medicare Part D then select the latest record. For example if both the clients have Medicaid Part D then select the latest record based on system time stamp. If Client A has Medicare and Medicare Part D and Client B has Medicaid. Then select all three records. If Client A has Medicare and Client B has Medicare then pick the latest record Always use Ramsell ID in case one exists
	Insurance	For all other insurance types, keep the both the records and append them. For example if Private Insurance and COBRA record exist then keep both the records. However if both the clients have Private Insurance or COBRA then keep the latest of the two.
13	Pharmacy	Always select the record with Pharmacy. In case there are no Pharmacy assigned then keep NULL. In case both the clients have Pharmacy then select based on the latest time stamp.
14	Clients having common Care services and the services eligibility status is NOT Denied	Pick the most recent record. Scenarios listed in Test_Scenarios tab

The automated client merge process will process as per the pre-defined rules, therefore reducing the need for manual intervention when merging clients.

Feature Updates: Client Merge

Client Merge Report

Client Merge Report

Start Date *

03/20/2023

End Date *

04/11/2023

Merged ClientId

Merged By

X Clear

Q Search

Download

Print

Refresh

Merged Client ID	Original Client ID 1	Original Client ID 2	Merged By	Merge Date	Status	Exception Message
419338	194423	258275	00000354210	03/20/2023	Complete	
419340	400192	418910	00000354757	03/20/2023	Complete	
419344	203770	236419	00000353457	03/20/2023	Complete	
419345	190714	264128	00000354757	03/20/2023	Complete	
419346	412894	419233	00000354210	03/20/2023	Complete	
419348	184488	265298	00000354210	03/20/2023	Complete	
419350	187205	259269	00000354210	03/20/2023	Complete	

TCT Users have access to the number of duplicate clients that were automatically merged by the system or approved for merge by users, therefore ensuring and monitoring data quality.

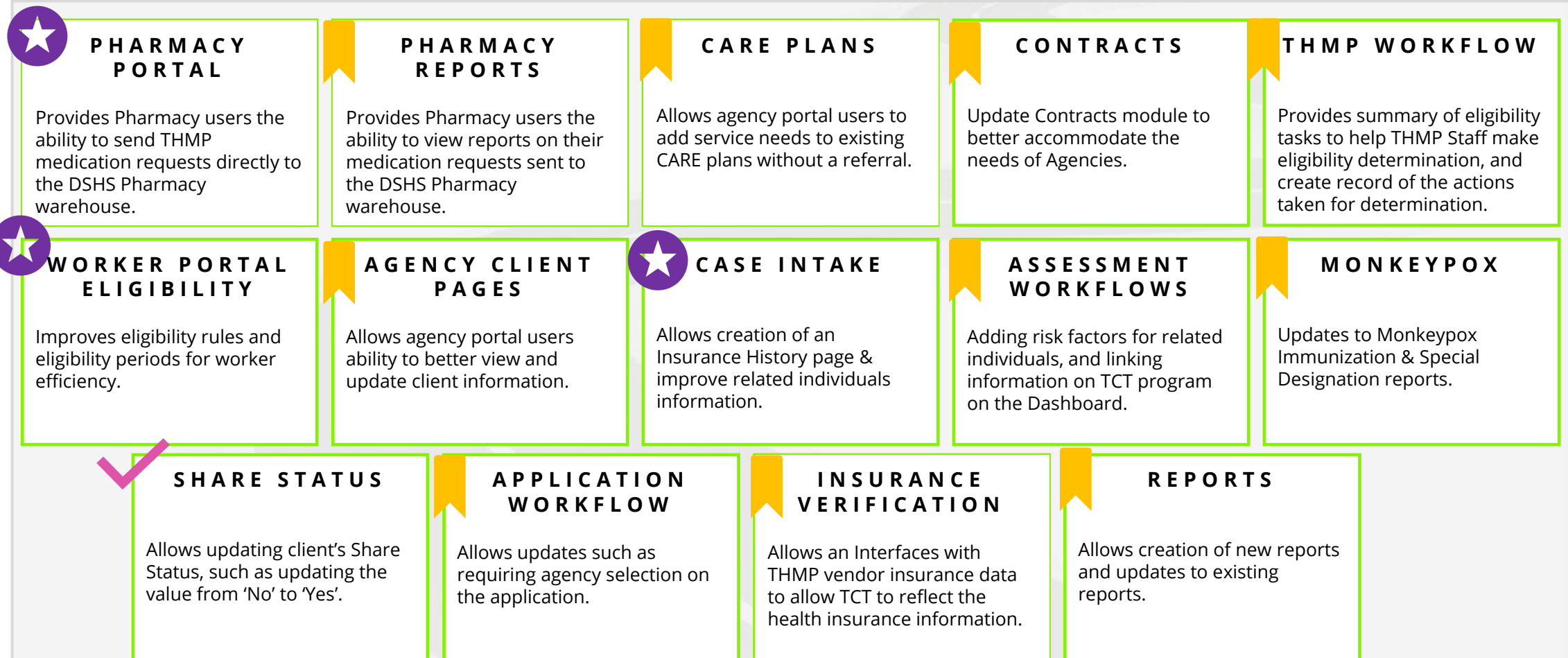
Client Merge Report: Exception Messages

Merged Client ID	Original Client ID 1	Original Client ID 2	Merged By	Merge Date	Status	Exception Message
419959	419959	419929	Samsharma584	04/12/2023	Complete	
419960	419960	419954	Samsharma584	04/12/2023	Complete	
419961	419961	419948	Samsharma584	04/12/2023	Complete	
0	258099	197325	Samsharma584	04/12/2023	Exception	Client id 258099 is not Active.Client id 197325 is not Active.
0	254043	188934	Samsharma584	04/12/2023	Exception	Client id 254043 is not Active.Client id 188934 is not Active.
0	202544	126467	Samsharma584	04/12/2023	Exception	Client id 126467 is not Active.
0	208721	205411	Samsharma584	04/12/2023	Exception	Client id 208721 is not Active.Client id 205411 is not Active.
0	208722	205412	Samsharma584	04/12/2023	Exception	Client id 208722 is not Active.Client id 205412 is not Active.The clients have different share statuses and cannot be merged.
0	150190	111250	Samsharma584	04/12/2023	Exception	Client id 150190 is not Active.Client id 111250 is not Active.The clients have different share statuses and cannot be merged.
0	265267	199070	Samsharma584	04/12/2023	Exception	Client id 199070 is not Active.
0	265208	195087	Samsharma584	04/12/2023	Exception	Client id 265208 is not Active.Client id 195087 is not Active.
0	419937	419936	Samsharma584	04/12/2023	Exception	Client id 419937 is not Active.
0	419925	419930	Samsharma584	04/12/2023	Exception	The clients have a share status of No. Merging will allow all the providers associated to the clients to view the merged clients information. Are you sure you want to proceed?
0	419949	419957	Samsharma584	04/12/2023	Exception	The clients have different share statuses and cannot be merged.
0	419951	419955	Samsharma584	04/12/2023	Exception	The clients have different share statuses and cannot be merged.

TCT Users will be able to view when the automated merge process fails, therefore ensuring client records can be reviewed and verified, to proceed with automated client merge.

Project Plan: Long-Term

The graphic below represents the features our teams plan to develop throughout the year*.



*This project plan is subject to change as priorities may change.